Session 8: Module 1 – Appointments Overview

SCRIPT

Description	Text
1. Introduction	**Welcome** to M-SPIRIT **Session 8, Module 1**, of the M-SPIRIT Required Online Training presented by the Montana Department of Public Health and Human Services WIC Program.
2. Duration	Session #8 should take 60 minutes to complete all of its modules.
3. Overview	The modules in this session will provide an in-depth review of the appointment scheduling software in M-SPIRIT.
4. Objectives	After reviewing all of the modules in this session, you will be able to:
	Schedule appointments at any clinic in your agency, reschedule and delete appointments, view appointments and document appointment reminders.
5. Start	Scheduling Appointments
6. <appt>	Appointments can be scheduled from a number of different screens in M-SPIRIT.
	The Schedule Appointments icon looks like a calendar.
	The icon is available in the Participant Search/List screen once a search has been performed.
	Schedule Appointments is also an option in the Participant List menu. Go ahead and click the menu.
7. <appt1>	<no script>
8. <appt2>	It is available in the Participant Folder…
	...and as an option in the Participant Activities menu. Again, click the menu.
9. <appt3>	<no script>
10. <appt4>	We can schedule an appointment at the end of the CGS…
11. <appt5>	...and after Prescreening a participant.
	Appointment Scheduling has one requirement: a participant record must already exist in the database to be able to schedule an appointment.
	Let's click OK and take a look at the Schedule Appointments screen.
12. <appt6>	The Appointments prompt always opens before the Schedule Appointments window.
	If we utilized group classes, this prompt would enable us to access the appropriate calendar using all the same icons, menu options and checkboxes.
	The Close button cancels opening the Schedule Appointments screen.

	The Schedule Appointment button is default selected, so we can either press the Enter key or click the button to select it. Go ahead.
13. <appt7>	When the Schedule Appointments for Household window opens, it expands to fill the entire screen…
	...which is ideal for being able to view appointment times and columns, but not so great for our ability to record the screen.
	So, we shrunk the size of the screen to accommodate the recorder's limitations so that the entire screen is viewable.
	Please keep in mind while viewing this module that this is smaller than the screen you will be using in M-SPIRIT.
14. <appt8>	The Schedule Appointments for Household screen always default opens to the current date, which is displayed at the top of the schedule.
	The calendars displayed are the current month plus the next three months.
	Go ahead and click the right arrow at the top of the calendars…
15. <appt9>	...and the calendars shift forward 4 months.
	Click the left arrow at the top of the calendars…
16. <appt10>	...and it shifts back to the original 4 calendars.
	The monthly calendars are color-coded based on schedule availability.
	The current date is green.
	Dates with both business hours and resources, or staff, scheduled are yellow…
	…and holidays are red.
	Go ahead and click on December 2.
17. <appt11>	When you select a date on the calendar, it turns blue…
	...and the schedule and date refresh to display for the selected date.
	Dates that aren't available for scheduling appointments are gray.
	The schedule itself is labeled with both the clinic, and as we've already mentioned, the selected date.
	The available Resources, or staff, are displayed in the column headers.
	Resource names are determined by the Local Agency when the clinic calendar is built.
	Up to 4 schedules are viewable at one time.
	A scroll bar at the bottom of the schedule allows us to view the rest of the resource columns.
	The gray areas in the schedule represent times in which the resource is unavailable for appointments during the business hours.
	The schedule defaults to 15 minute increments every time it is opened.

	We can modify the time increment displayed using the View By drop-down.
	Click the drop-down arrow.
18. <appt12>	The available increments are 5 Minutes, 15 Minutes, 1/2 Hour and Hour.
	Go ahead and select 5 Minutes…
19. <appt13>	...and the time is displayed in 5 minute increments.
	Click the drop-down arrow again.
20. <appt14>	Select 1/2 Hour…
21. <appt15>	...and the time is displayed in 30 minute increments.
	OK. One more time. Click on the View By drop-down.
22. <appt16>	Select Hour…
23. <appt17>	...and the time is displayed in 60 minute increments.
	However, there is one caveat when viewing 60 minute time increments.
	Only appointments scheduled on the hour actually show.
	For example, if two appointments were scheduled...
24. <appt18>	...one for Mama at 8:00 and one for Sugar at 8:30, if we change our view to 60 minute increments…
25. <appt19>	...only the 8:00 appointment for Mama is displayed.
26. <appt20>	So, what do you think happens if only an 8:30 appointment is scheduled?
27. <appt21>	Well, since it only shows the appointments at the top of the hour, the 8:30 doesn't even display.
	Long story short, the Hour increment should probably not be used unless your agency only has 60 minute appointments.
	Go ahead and go back to the 15 minute increment.
28. <appt22>	<no script>
29. <appt23>	<no script>
30. <appt24>	Once a change is made to the time increments, it is maintained until the Schedule Appointments for Household screen is closed.
	One of the functions in Build Clinic Calendar is the ability to write a note for a specific date.
	If a note has been written, the button is enabled when that date is selected.
	Click the Notes button.
31. <appt25>	Do you think we can add to the note in the Appointment Scheduling screen? We are going to try…

32. <appt26>	<typing>
	Well, it kind of looks like it. But what happens when we close the note?
	Click the Close button.
33. <appt27>	Let’s see if the text we added to the note was saved. Click the Notes button again.
34. <appt28>	Nope. Just remember that the note can only be created via Build Clinic Calendar...
	...and may be a helpful tool to notify staff about anything they should be aware of for a specific date.
	Click Close again.
35. <appt29>	We can also change the calendar to a weekly display instead of daily.
	Click the Week radio button.
36. <appt30>	The viewable week is displayed at the top of the schedule.
	Only those days with defined resource columns display.
	For days defined in the past during the current week, any time slots without appointments scheduled, as we can see with 11/29, are grayed out.
	The scroll bar at the bottom allows us to view the rest of the week.
	Click to the right of the scroll bar.
37. <appt31>	Notice the right side of the screen is now blank.
	Appointments cannot be scheduled while in Weekly view; only viewed.
	The < Previous Week and Next Week > buttons move the calendar backward and forward by a week.
	Go ahead and click the Next Week > button…
38. <appt32>	...and the schedule moves forward a week.
	Notice the selected date is the 9th, which is the last date of the week with resources defined.
	Let’s click back to the Day view.
39. <appt33>	The selected date is still 12/9 since that was the selected date when we reverted back to Day view.
	So, if you remember way back to when we first opened this screen, we had just finished prescreening Mama Cookie.
	Appointment Scheduling is a household level screen…
	...which means we can schedule an appointment for anyone in the household by opening the screen for one member.
	That member is default selected in the Appointment Information section of the screen.
	The right side of the screen is where we select the details before scheduling an appointment.

	The Date fields default to the current month and year.
	We can change the calendar by selecting the Date fields, but it is much more efficient to work with the calendars on the left of the screen.
	The Clinic defaults to the clinic we are currently working in.
	Click the Clinic drop-down.
40. <appt34>	All of the clinics in your agency are listed…
	...and by selecting another clinic, we can schedule the appointment at a different clinic in your agency.
41. <appt35>	The Member drop-down lists all members of the household.
42. <appt36>	Notice that Honey and Gumdrop are part of the same household...
	...but do not belong to the same clinic, and in Gumdrop's case, the same agency.
43. <appt37>	Click the Member drop-down…
44. <appt38>	...and notice that all the members of the Cookie household are listed, including Honey and Gumdrop.
	Click on the drop-down again to close the list.
45. <appt39>	Now, click on the Appt Type drop-down.
46. <appt40>	There are several defined appointment types.
	Your agency can also define its own appointment types in Build Clinic Calendar.
	Click the drop-down again to close the list.
47. <appt41>	The Duration, or length of the appointment, defaults based on the Appointment Type selected and again, is determined by your agency when the calendar is built.
	Click on the Duration drop-down.
48. <appt42>	We can also change the duration of an appointment by selecting from the drop-down.
	The duration options are 5 minute increments.
	An appointment can be as short as 5 minutes and as long as 120 minutes.
	Click the drop-down again to close the list.
49. <appt43>	The WIC Category defaults to the participant's current category.
	Click on the drop-down.
50. <appt44>	Since the WIC Category may be different from the default, especially for women, we can change the category as appropriate.
	Click the drop-down to close the list.

51. <appt45>	The Contact Type assists with assessing whether the processing standards, which require participants/applicants to be seen within a specified amount of time, are being met.
	For reference, please see Policy 6-1 in the State Plan.
	The default is In person and should be changed to By phone when the request for the appointment is made via a phone call.
	The Comments text field allows us to write a comment that pertains to the appointment we are scheduling.
	We will review this functionality in further detail in the next module when we actually schedule an appointment.
	The function of the Delete Appt, OK, and Close buttons are pretty intuitive, but again, we will discuss them in the next module.
	The REFRESH button ensures that appointments have not been scheduled by other staff while the screen has been open.
	It is good practice to click the REFRESH button before scheduling an appointment to ensure the appointment date and time are still open.
52. Questions	Do you have any questions about what we just reviewed? If so, please submit them via the M-SPIRIT Frequently Asked Questions forum on the Montana WIC website.